

1985

EC85-2040 A Record of Important Family Papers

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University of Nebraska Cooperative Extension Service EC 85-2040
Institute of Agriculture and Natural Resources

A RECORD OF IMPORTANT FAMILY PAPERS

Name _____ Date Recorded or Revised _____
Copy 1 of this record stored at _____ Copy 2 stored at _____
Safe Deposit Box Number _____ at _____ Bank: Key kept at _____
Social Security Numbers _____ Where cards are kept _____

NAMES OF ADVISERS

Adviser	Name	Address	Phone Number
Accountant			
Attorney			
Banker			
Broker			
Doctor			
Executor			
Insurance Agent			

INSURANCE POLICIES

Type	Company & Address	Policy Number	Effective Date	Policy Amount	Premium	Payment Due	Beneficiary	Policy Kept
Vehicles								
Disability								
Health & Accident								
Homeowner's Package								
Hospitalization								



Issued in furtherance of Cooperative Extension work, Acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture. Leo E. Lucas, Director of Cooperative Extension Service, University of Nebraska, Institute of Agriculture and Natural Resources.



· U.S. SAVINGS BONDS, CERTIFICATES OF DEPOSIT, TREASURY BILLS, BONDS AND NOTES

Serial Number	Owner & Co-Owner	Purchase Price	Date of Purchase	Maturity Date	Value at Maturity	Beneficiary	Bond Kept

REAL ESTATE

Type	Location	Purchase Price	Mort. Amt.	Mortgage Holder	Record Kept

VEHICLES

Make	Model & Year	Engine Number	Purchase Price	Registration Name	Paper Kept

DEBTS

Description	Name & Address of Person Owed	Number Acct.	Amt. of Debt	Rate of Int.	Number & Amt. of Payments	Final Pymt. Due	Record Kept

PAYMENTS DUE US AND RETIREMENT PLANS

Description	Name & Address of Person Owning	Amount of Payment	Rate of Int.	Number & Amt. of Payments	Final Pymt. Due	Record Kept

OTHER IMPORTANT PAPERS

Type of Paper	Paper Kept	Type of Paper	Paper Kept	Type of Paper	Paper Kept
Adoption papers		Deed to house & lot		Military service records	
Automobile title		Divorce papers		Organization membership	
Baptismal records		Education records		Passports	
Birth certificates		Employment records		Pension records, retirement plans	
Business records		Guarantees & warranties		Patents & copyrights	
Cancelled checks		Health records		Real estate abstract	
Charge account list		Household inventory		Rental property records	
Citizenship papers		Important keys		Social Security card & records	
Death certificates		Last instructions		Tax records	
Deed to burial plot		License to practice		Will for _____	
Deed to farm & lots		Marriage certificates		Will for _____	